

# DOD MENTOR PROTÉGÉ AGREEMENT SEMI-ANNUAL REPORT

☐ As of March 31, \_\_\_\_\_ ☐ or September 30, \_\_\_\_\_

## MENTOR FIRM:

Point of Contact: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email: \_\_\_\_\_

## PROTÉGÉ FIRM:

Point of Contact: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email: \_\_\_\_\_

## PART I: AGREEMENT INFORMATION

### A. General

Period of Performance

Start Date: \_\_\_\_\_

End Date: \_\_\_\_\_

Type of Agreement

Credit Agreement ☐

or Reimbursable Agreement ☐

*If agreement was terminated, please provide:*

Effective Date of Termination: \_\_\_\_\_

Requested by:

Mentor ☐

Protégé ☐

Reason for Termination: \_\_\_\_\_

### B. Financial Status (Reimbursable Agreements only)

Total Dollars Obligated: \$ \_\_\_\_\_

Military Service/Defense Agency Sponsor: \_\_\_\_\_

Expenditure Data

Vouchers Submitted:

Fiscal Year to Date	Cumulative from Start of Agreement

*If terminated agreement was funded, please provide:*

Funds remaining: \$ \_\_\_\_\_

Date of Deobligation: \_\_\_\_\_

Mod No.: \_\_\_\_\_

### C. Credit Taken for Developmental Assistance Costs

Credit toward SDB Awards (SF 294/295)

Fiscal Year to Date		Cumulative from Start of Agreement	
Actual Expenditures	Credit Applied	Actual Expenditures	Credit Applied

## PART II. RETURN ON INVESTMENT

### A. Protégé Data:

Employees

Annual Gross Revenues:

At Start of Agreement	As of Report Date

Awards to this Protégé

Value of DoD Subcontracts from Mentor:

Value of DoD Subcontracts from other Prime Contractors:

Value of DoD Contracts Awarded (protégé as prime):

Fiscal Year to Date (\$000)	Cumulative From Start of Agreement (\$000)

### B. Mentor SDB subcontract awards under DoD contracts( as reported on SF295):

Subcontract Awards to SDBs

Total Subcontract Awards

Fiscal Year to Date		Cumulative From Start of Agreement*	
\$000	% of total	\$000	% of total
	100%		100%

\*As of start date of agreement *or* as of last reporting period prior to start date

## PART III: DEVELOPMENTAL ASSISTANCE PROVIDED(Cumulative From Start of Agreement)

### A. Type of Assistance/Form (e.g. classroom, OJT, etc.)

#### 1. Business Development Assistance provided to this protégé

- A. \_\_\_\_\_
- B. \_\_\_\_\_
- C. \_\_\_\_\_

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### 2. Technical (Mission Related) Assistance provided to this protégé

- A. \_\_\_\_\_  
B. \_\_\_\_\_  
C. \_\_\_\_\_

### B. Historically Black Colleges and Universities /Minority Institutions(HBCU/MI), PTAC, SBDC

Was there use of HBCU/MI, PTAC, SBDC for this agreement?

Yes ☐

No ☐

If yes, please provide name of entity/type of assistance provided to protégé:

- A. \_\_\_\_\_  
B. \_\_\_\_\_

### PART IV: IMPACT OF THE AGREEMENT(Cumulative through term of Agreement)

#### A. Certifications, Awards Received (eg. ISO 9000, preferred supplier status...)

- A. \_\_\_\_\_  
B. \_\_\_\_\_  
C. \_\_\_\_\_

#### B. Technical Capabilities Realized/Enhanced (e.g. specific technology transferred)

- A. \_\_\_\_\_  
B. \_\_\_\_\_  
C. \_\_\_\_\_

#### C. Business Infrastructure Gained (e.g. strategic planning, improved accounting system...)

- A. \_\_\_\_\_  
B. \_\_\_\_\_  
C. \_\_\_\_\_

#### D. New Markets Realized (e.g. other DoD, Federal, commercial - be specific)

- A. \_\_\_\_\_  
B. \_\_\_\_\_  
C. \_\_\_\_\_

#### E. Other Information (e.g. loans, equipment, investments in the protégé)

- A. \_\_\_\_\_  
B. \_\_\_\_\_  
C. \_\_\_\_\_

### PART V: PROGRESS OF AGREEMENT

#### A. Milestones Achieved

	Title of Milestone	Date Completed
1.		
2.		
3.		

#### B. VARIATIONS TO AGREEMENT (revised milestones and projected completion dates)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
Signature (Mentor)

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature (Protégé )

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

Concur ☐  
Do not Concur ☐  
(provide detailed rebuttal)

Please submit signed copy (not later than 30 days following end of reporting period) to cognizant DCMC point of contact for Mentor-Protégé Agreement, with copies to: DoD OSADBU, cognizant Service/Agency OSADBU, and Protégé.

PROTÉGÉ HAS 30 DAYS TO REBUT INFORMATION PROVIDED BY MENTOR. SUBMIT REBUTTALS AS ABOVE

## **Instructions for the *DoD Mentor-Protégé Agreement Semi-Annual Report***

### **MENTOR INSTRUCTIONS**

1. **Reports are due by April 30** (for period Oct 1 - Mar 31) **or October 31** (for period Apr 1 - Sep 30).
2. Reports are to be completed, signed, and submitted by the Mentor firm. Please ensure that all required information is included on report form.
3. Mentors must submit a **separate report for each Protégé under an approved DoD Mentor-Protégé agreement that was active during any portion of the reporting period.**
4. Please use the U.S. Federal Government's Fiscal Year (October 1 through September 30).
5. **Period of Performance "Start Date" for Credit Only Agreements** is the date of the DoD Approval letter. **For Reimbursable Agreements**, the **"Start Date"** is the **"Effective Date"** of the contractual document obligating the Mentor-Protégé funds.
6. **Period of Performance "End Date"** is the planned completion date of the agreement.
7. Data requested as **"Cumulative from Start of Agreement"** shall cover the period from the "start date" of the agreement through the end of the current reporting period.
8. **Part III: Developmental Assistance Provided:** Please provide a summary of the assistance provided to Protégé firm. **IMPORTANT:** Please also include the amounts and descriptions of all incidental costs incurred (costs other than those attributable to assistance furnished by mentor's employees or costs attributable to assistance provided by Small Business Development Centers, Historically Black Colleges and Universities and Minority Institutions, and Procurement Technical Assistance Centers).
9. **Mentors are encouraged to provide supplemental information that may be of value in assessing performance under the agreement.**
10. Please forward completed copies of the signed report to the following:
  - A. Cognizant Defense Contract Management Command (DCMC) Contract Administration Office (CAO), Attn: Administrative Contracting Officer (ACO)
  - B. DoD Mentor-Protégé Program Manager  
DoD SADBU  
1777 North Kent Street, Suite 9100  
Arlington, VA 22209
  - OR  
FAX No. (703) 588-7561
  - C. The Protégé Firm (**Please Note: Mentor will provide Protégé Firm with Name and Address of Mentor's cognizant DCMC CAO.**)
  - D. **For Reimbursable Agreements Only:** The cognizant Military Service or Defense Agency Office of Small and Disadvantaged Business Utilization (OSADBU) (See Below).

### **PROTEGE INSTRUCTIONS**

1. Protégé will review report and within 30 days sign and concur or rebut any information submitted by the mentor.
  - A. To concur: Sign the report and indicate that you concur.
  - B. To non-concur: Sign the report and indicate that you do not concur. Attach a detailed rebuttal regarding what items are being disputed.
2. Please forward copies of the signed report (and attached rebuttal if non-concurring) to the following:

- A. Mentor's cognizant DCMC CAO, Attn.: ACO
- B. Protégé's cognizant DCMC CAO, Attn.: ACO
- C. DoD Mentor-Protégé Program Manager

DoD SADBUI

1777 North Kent Street, Suite 9100  
Arlington, VA 22209

OR

FAX No. (703) 588-7561

- D. **For Reimbursable Agreements Only:** The cognizant Military Service or Defense Agency Office of Small and Disadvantaged Business Utilization (OSADBU) (See Below).

**Department of the Army:**

Army Mentor-Protégé Program Manager  
Department of the Army OSADBU  
Room 2A712  
106 Army Pentagon  
Washington, DC 20310-0106

OR

FAX No. (703) 693-3898

**Department of the Navy:**

Navy Mentor-Protégé Program Manager  
Department of the Navy OSADBU  
Washington Navy Yard  
Bldg. 36, Room 207  
720 Kennon Street, S.E.  
Washington, DC 20374-5079

OR

FAX No. (202) 685-6865

**Department of the Air Force:**

Air Force Mentor-Protégé Program Manager  
Department of the Air Force OSADBU (SAF/SB)  
Room 5E271  
1060 Air Force Pentagon  
Washington, DC 20330-1060

OR

FAX No. (703) 614-9266

**Defense Information Systems Agency:**

DISA Mentor-Protégé Program Manager  
Office of Small and Disadvantaged Business Utilization  
DISA/D04  
701 South Courthouse Road  
Arlington, VA 22204-2199

OR

FAX No. (703) 607-4173

For further assistance or information on this reporting requirement please call: Richard Mott at (703) 588-8634 or contact our hotline at 1-800-553-1858.